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Rui Duarte

SUMMARY



Highly motivated and experienced IT professional with over 33 years of experience in a variety of roles, including technology consultant, software developer, and trainer. Proven track record of success in designing, developing, and implementing IT solutions that improve efficiency, accuracy, and productivity. Expertise in Microsoft Dynamics 365, Power BI, SharePoint, Access, SQL Server, and other Microsoft technologies. Fluent in Portuguese and English.

SKILLS

Business Data Analyst: Analysis and specification of requirements and proficiency in databases (MS SQL Server, SSIS and SSAS, Oracle and MS Access), VBA, and Dashboards (Excel, SSRS and Power BI).

SharePoint development: Design of workflows with SharePoint Designer and Power Automate in SharePoint 365, including REST and JSON.

Certified Trainer: Delivered more than 700 hours of training in various technical applications.

Languages: Portuguese Native, English Fluent (C2), French Intermediate (B2).

CERTIFICATIONS

Awarded COSMIC TOP SECRET security clearance | Portuguese National Security Office **09/2022**
This is the highest security clearance for NATO, awarded by national intelligence service.

Awarded SECRET UE security clearance | Portuguese National Security Office **07/2020**
This is the second highest security clearance in EU, awarded by national intelligence service.

English Certificate 78/100 (C2 Proficient) | EF Standard English Test (EF SET) **06/2020**
This is a certification of my English language proficiency, both written and oral, which can be consulted at EF SET.

Training of Trainers - SMEs and Consumer Rights | DECO / BEUC **03/2018**
This certification not only provided the tools to deliver the contents to other organizations, but also increased the knowledge of my own company's interactions with customers under the Consumer Law Ready initiative.

Certificate of Pedagogical Competencies | IEFP - Institute of Employment and Professional Training **02/2008**
IEFP certifies that I own the required skills and knowledge to be a successful trainer.

EXPERIENCE

Sales Excellence Manager | Microsoft | Lisboa, Portugal *(Contracting via Apeiron Sumus)* **07/2021 – 12/2023**
Through the service contract signed with Apeiron Sumus to work on the Microsoft Solution Assessment project, I increased process efficiency by more than 30% and helped reduce error rates to residual values.
Main tasks performed:

- Handling data from multiple sources: Microsoft Dynamics 365 Sales, Dataverse tables, SharePoint lists, Excel and CSV files, Power BI reports, obtained through queries to SQL databases and cubes and connections to Dynamics API.
- Help establish KPIs and pipeline discipline, instil appropriate forecasting rigour, accuracy and accountability, and provide continuous and transparent feedback to the entire Apeiron Sumus internal team and Microsoft stakeholders.
- Manage performance to meet targets, learn quickly and update plans in an agile manner using Azure DevOps, with Kanban boards and sprints, creating and managing content in Dataverse, SharePoint 365, Microsoft Customer Voice / Forms and developing complex Power Automate flows.
- Work with the supported sales team structure and the Microsoft sales process, helping with new hire onboarding and access management, training, and troubleshooting.
- Create reports and dashboards in Excel and Power BI and their respective data repositories: Datamarts, Dataflows and Datasets in Power BI online.

Main tools used: Microsoft Dynamics 365, Power BI desktop and online, Excel, Access, Azure Data Studio, MS SQL Server Management Studio, DAX Studio, XrmToolBox, Azure Virtual Desktop, MS Teams, Power Automate, Visio, MS Graph, API connections using REST and JSON.

Webmaster at European Agency | eu-LISA | Tallinn, Estonia *(Contracting via Unisys)* **08/2020 – 06/2021**
Working for eu-LISA was more than just a job, it was a mission, to help all Europeans feel safer! Loved both working in such a multicultural environment and living in Tallinn, Estonia!
Hired as an Intramuros for eu-LISA through a contract between Unisys and my own company, Planned Reality OÜ, my main job was to be the IT within the Learning and Development Sector of the HR Unit, where I was able to upgrade the communication and collaboration methods, reducing administrative burden and increasing efficiency. My main tasks were:

- Manage and develop the LNDS and HRU SharePoint websites, creating lists, document libraries and automations with workflows, such as:
  - Collection of staff members' reclassification and performance figures from managers.
  - Service request form for external training.
  - Creating and maintaining a monthly internal newsletter using SharePoint lists and email automation with MS Access VBA.
  - Revamped the agency's onboarding and departure procedures, shifting from a single-threaded, paper-based system to a streamlined digital process utilizing SharePoint lists and workflows. This innovative approach resulted in an impressive 85% reduction in processing time, as multiple stakeholders were able to execute their tasks in parallel.
- Administer the learning management system (Totara): User's management, job assignments, creating contents and reporting.
- Create and edit learning contents using PowerPoint, Camtasia, Snagit, Articulate 360, Canva, Visme and Miro.

- Efficiently oversee and coordinate tasks through the utilization of Asana's Kanban boards.
- Design and implement the Staff Committee Election process using Election Buddy.
- Oversee staff engagement using Peakon.
- Liaising with external suppliers and internal security team to support the current on-premises Totara and prepare the migration to an externally hosted version.
- Working with internally used applications (ARES tool from European Commission, Planview ProjectPlace and Timesheet).
- Attending and creating meetings using Cisco Jabber and Conference, MS Teams and Samba Live.
- Training colleagues on some of the above-mentioned tools.

Developer | Caceis Bank | Lisboa, Portugal *(Contracting via Accenture)* **04/2020 – 07/2020**

As part of the CALx project which originated from a collaboration between Accenture Lisbon and the Crédit Agricole bank to handle the operations of Caceis Bank, I was the most senior member of a team of 3 developers who were hired to form the newly created MS Access support team in Lisbon, replacing the support team from India and to help the German bank to handle all its daily tasks:

- In the first 2 months, I attended daily 6-hour sessions via videoconference to learn the operation of over 40 MS Access applications.
- Reconcile financial transactions, modify forms and queries, create reports, import and export several types of files.
- Analyse, develop, enhance, and maintain MS Access, SQL Server and Oracle databases applications.
- Improve communication between IT and the bank for better alignment.
- Improve automation of existing processes to support business reporting needs.
- Present and build technical solutions.
- Manage and develop scripts in VBA (Excel), .NET C#, Bash and PowerShell.
- Main achievements: Improved efficiency by more than 25% and modernisation of the bank's applications and procedures, as well as increased security and reliability of delivered results.

IT Consultant | Multiple individual customers and organizations | Lisboa, Portugal **09/2017 – 03/2020**

During this period, I worked as an independent IT consultant and qualified as a trainer through the European Commission's Consumer Law Ready initiative, which allows me to provide training on consumer rights to SMEs.

I had the opportunity to establish several important partnerships that enabled me to build up a diverse client portfolio for which I carried out the following tasks:

- Creation, development and support of 6 websites, using WordPress, HTML and CSS, in the following business areas: Hairdressing, beauty clinic, image consultancy, hearing aids and professional mentoring, all in Portugal and also a capoeira dance academy in Switzerland.
- Creation of three 360° virtual tours using Matterport technology for commercial spaces: restaurant, event space and clothes shop.

Senior IT Consultant | Portugal Telecom, S.A. | Lisboa, Portugal **06/1990 – 08/2017**

During my 27 years working at Portugal Telecom (now MEO / Altice), I was able to progress professionally from Administrative Assistant to Senior IT Consultant.

From August 2016 to August 2017, I was a member of the Business Intelligence team in the Commercial Department. My primary role was to manage customer sales data and improve the quality of the reports for both internal stores and external agents. To achieve this, I utilized all of Microsoft's BI tools:

- SQL Server - Creating queries, views and stored procedures.
- SSAS (SQL Server Analytical Services) - Creating and managing cubes for data consumption both in Excel and in SSRS reports.
- SSIS (SQL Server Integration Services) - Development of packages for importing and manipulating data from different data sources such as Excel and text files into SQL databases.
- SSRS (SQL Server Reporting Services) – Created several reports and I would highlight the optimisation of daily sales reports that were shared with the internal sales team and more than 150 external agents.

I also developed a tool to manipulate Excel files using the .NET NPOI library in C# together with PowerShell scripts.

Between October 2015 and August 2016, I was in the IT department providing support to the Legal Department (my previous role) and also performing the following tasks:

- JIRA: I was part of the team that spent 3 months preparing the implementation of the Oneway project, which consisted of replacing 7 internal applications (Backlog, Issue Tracker, etc.) with JIRA. We met with the company's various departments to analyse and define the requirements, design the new processes, assign responsibilities, create training content and study the platform's administration functionalities. Unfortunately, two weeks before going live, the company decided to cancel the project.
- Support of the GPS application (PT ACS Health Plan Management) developed by an external partner: Collection and analysis of defects reported by end users; after the new version of the application was provided by the external supplier, testing in a QA environment and then installation in production using Harvest. If the issues were data related, I fixed them using SQL scripts. In parallel, I also updated the content on the Institutional Portal using HTML and CSS.

In my first 25 years of work, I was in the Legal Department, where I provided support for all the department's technological needs, acting as a mini IT department within the Legal Department, including interactions with other areas of the company, mainly Human Resources, Finance and IT, performing the following tasks:

- First line of helpdesk (solving software and hardware problems), project management, training and technical advice for legal cases, analysis, specification of requirements and management of applications for the computerisation of legal cases, namely:
  - Jurimind - application that manages all the Department's cases.
  - SGPT - application created to manage legal actions against telecom operators under Law 32/2008, known as Data Retention.
  - ILC – Application that manages the Legal Interception of Calls.
- Support for internal and external audits, including SOX compliance.

- Development of MS Access applications using VBA and macros for process management, creation of PowerPoint presentations and advanced Excel reports.
- SharePoint: Creation, management and administration of content (websites, document sets, lists, libraries, taxonomies, custom content types, etc.) in SharePoint, including the design of workflows with SharePoint Designer.
- Trainer: Following my certification as a trainer, I conducted a multitude of in-house training sessions, amounting to over 700 hours. These sessions encompassed a range of topics, including Word, Excel, PowerPoint, Access, Outlook, the Internet and some internal applications. Once the intended audience and primary subject had been established, it was my responsibility to determine the training content and produce all relevant materials, tailored to the trainees' skill level.
- SAP R3: SAP HR - preparation of the department's staffing plan; SAP FI - control of the department's budget, CAPEX and OPEX; SAP Logistic - stock control of office supplies and requisitions of stationery.
- Member of the support team for the General Shareholders' Meetings of the holding company PT SGPS with the following duties:
  - Close contact with the company's top management and external financial institutions, as well as with the shareholders themselves.
  - Comparison of the information (databases and excel / csv files) provided by the Lisbon Stock Exchange with the data provided by the securities departments of banks and other financial institutions, as well as with the documentation sent by the company's shareholders.
  - Support in collecting and counting the votes and displaying the voting results once they have been duly audited.

Co-owner and IT Consultant | InforWorld - Informática e Serviços, Lda. | Lisboa, Portugal **10/2000 – 12/2008**

I was a managing partner of InforWorld for 8 years, working part-time with a friend. We both owned 50% of the company and fulfilled all the necessary tasks to meet our clients' needs in terms of computer hardware and software:

- Hardware technician (installation, configuration, and repair of more than 300 computers, servers and devices, and implementation of computer networks).
- Software technician (management of Windows Server, configuring applications, developing databases).

Main achievements: Successfully meeting and even exceeding our clients' requests, both in small and medium-sized businesses and state organizations.

INVOLVEMENT

Redemption International for the Blind | First Secretary of the Board of the General Meeting **12/2018 - Present**

- On a free of charge basis, ensure the execution of various general administrative tasks at this private charity to increase the Association's involvement and visibility.
- Accompany the Chairman of the Board of Directors at various meetings and events, to increase the Association's reach.
- Translation of contents from English to Portuguese.

PROJECTS

Web Summit - Volunteering | Web Summit Lisbon **11/2019, 11/2021, 11/2022**

- Volunteering at an event requires commitment, not just time, while meeting new people and getting deeply involved in technology. I have contributed with more than 45 hours on different teams: Response and Support to the other 300 volunteers, Registration to help on the onboarding of the different attendees and general Operations.
- Main achievements: Increase the network of friends and professional contacts.

Communicate in Security - Volunteering | Sapo Portugal **10/2011**

- Designed the content of the trainings, following the directives of Sapo Portugal and the national security forces (PSP and GNR).
- Successfully achieved the monitoring of more than 30 hours of volunteer training in schools, within the framework of the Communicate in Security project with emphasis on bullying, social media and cyber security for teenagers and younger students.
- Having received good reviews from schools and stakeholders, the initially planned 15 sessions turned into more than double due to increased requests for more sessions.